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ABSTRACT

This paper reviews postapartheid educational policy between the 1994 and 1999 elections. Its objective is to interrogate the different concerns, approaches, and implications of the various policies that have been formulated to fundamentally transform the legacy of the apartheid system. Five principal concerns are discussed: (1) the historical legacy of apartheid education; (2) equity and justice; (3) democracy and participation; (4) economy and globalization; and (5) efficiency, quality, and effectiveness. The paper examines existing critical analyses of educational policy development and highlights what critics point out as the process of educational compromise and the narrowing of the policy agenda. Researchers have reported a growing skepticism regarding educational policy development in South Africa. While some hail the new policies, others worry about deep conceptual flaws, implied political betrayals, and empty principles. However, all of these accounts only provide partial explanatory frameworks for understanding educational change. By adopting a metapolicy approach to educational policy development, the paper considers the various influences that have shaped, and continue to shape, educational policy discourses. (Contains 91 references and 22 endnotes.) (DFR)

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POST-APARTHEID EDUCATIONAL TRANSFORMATION: POLICY CONCERNS AND APPROACHES

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POST-APARTHEID EDUCATIONAL TRANSFORMATION: POLICY CONCERNS AND APPROACHES

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Introduction

This paper reviews post-apartheid educational policy since 1994 until the elections of 1999. It critically examines the various influences that have shaped, and continue to impact on post-apartheid educational policy. The key objective of the paper is to interrogate the different concerns, approaches, and implications of the various policies that have been formulated in order to fundamentally transform the legacy of the apartheid system. In so doing, the conceptual tensions and difficulties that underpin the educational reform process in South Africa are highlighted.

The paper takes as its starting point existing critical analyses of educational policy development in South Africa. It highlights what critics point out as the process of 'educational compromise' and the narrowing of the policy agenda. In this respect, it engages with the writings of Chisholm & Fuller (1996), de Clercq (1997), and Tikly (1997) who in different ways reflect a growing scepticism regarding educational policy development in South Africa. This scepticism about educational policy in South Africa is particularly evident in the special edition of the Cambridge Journal of Education published in 1998. In their summary of articles in the journal, Enslin & Pendlebury (1998: 266-267), indicate that while 'much has been accomplished at the policy level, the real work of transforming practices and institutions has yet to be done. Several of our contributors hail the new policies, while others worry about deep conceptual flaws, implied political betrayals and empty principles.' However, all these accounts only provide partial explanatory frameworks for understanding educational change in South Africa. This paper adopts a meta-policy approach to educational policy development in post-apartheid South Africa and, in particular, considers the various influences that have shaped, and continue to shape, educational policy discourses.

This meta-policy analysis discusses educational policy development in South Africa in an overarching way in relation to five different, though interrelated frameworks:

- The framework of history. This framework focuses on the historical antecedents that have shaped post-apartheid educational policy and the constraints that the new government inherited from the apartheid order.
- The framework of equity and justice. Rooted in the past, this framework seeks to locate educational policy in the context of future planning which overcomes a specific history of inequity, imbalance, and injustice.
- The framework of freedom and democracy. This framework raises questions about the nature of the state, the nexus between the state and citizens, and the continual battle between individual freedom and collective vision in determining educational policy.
- The framework of the economy and global order. This framework discusses the ways in which the new South African state attempts to make sense of the processes of increasing globalisation and fundamental economic transformation in restructuring the education system.
- The framework of efficiency, effectiveness and quality. This framework considers the extent to which divergent understandings of this new lexicon of educational restructuring construct particular conceptions of educational change and transition in South Africa.

Like all explanatory frameworks, however, these frameworks are limited since they abstract and extrapolate tendencies. Reality is rather more complex, nuanced and diverse but such frameworks are

useful in delineating the broad trajectory of educational reforms in South Africa over the last five years.

1. Discursive influences on policy

In using the five frameworks to understand educational policy development in South Africa, this paper is located within the critical tradition of policy sociology (Ball 1990 & Raab 1994), focusing on the analyses **of** policy rather than the analyses **for** policy (Parsons 1997).

1.1 The historical inheritance and the conditioning of the policy discourse

Understanding educational policy discourses in South Africa has to be set in a context in which the construction of educational policy narratives were conditioned and constrained by the outcomes of the negotiated settlement between the Nationalist Party and opposition groups. The South African transition moment was a negotiated settlement in which both the then ruling state and oppositional forces conceded and compromised on a number of issues[2]. The ability to reconstitute and recompose a new educational system was therefore constrained by a number of factors that predated the elections of April 1994. These included the Sunset Clause that protected the employment of officials who had served under the previous system and which consequently made their immediate replacement difficult (Sayed 1997). The new government had not captured control of the important state apparatuses, including the education bureaucracy. Thus, the new government's capacity to act was limited (Offe 1985, Codd 1992).

At the same time, the new education officials who were appointed carried with them the stamp of political legitimacy but often lacked the necessary knowledge base and skills to manage the system. Moreover, the new educational intelligentsia were steeped in oppositional politics and their only recourse to alternative strategies of change were first generation policy texts, such as the National Education Policy Documents (1992/1993), and the African National Congress' Education and Training Framework (1994) and Implementation Plan (1994). These texts did not fully articulate with the realities of governing (Chisholm & Fuller 1996).

A third constraining condition was the Interim Constitution that emerged from the negotiations process. The Interim Constitution committed the National Ministry of Education to centralised strategic control over educational norms and standards but left the control of schooling to nine new provinces (schedule 6 item). The new political order that emerged was thus a semi-federalist state, a point that is returned to later in this paper.

Perhaps, the key constraining feature was the fact that the process of a negotiated settlement was an uneven one. The then ruling Nationalist party was both a negotiating group and the government of the day. It thus not only engaged in formulating possibilities and options for education but was also able to effect unilateral changes as it controlled the apparatuses of the state. An important aspect of its strategy was the unilateral deregulation of state assets. In education, it formulated the Clase Bills (Carrim & Sayed 1991, 1992) which gave over control of the ex-white schools to school governing bodies. In the interregnum from negotiation to elections, the Nationalist Party state effectively created a market-driven educational school system with white schools charging high school fees and in control of their physical assets as required by the constitution. The new government was thus committed to entering into bona fide negotiations concerning any alteration to ex-Whites-only schools. As a result the Nationalist Party stripped most state assets even before the new government came into being.

The political tenor that was established during the negotiations and was consolidated with the formation of a Government of National Unity (GNU) was one of compromise, negotiation and consensual agreement. The majority party (ANC) in the GNU was, as a consequence, reluctant to act decisively in restructuring the education system.

A particular set of conjunctural elements thus coalesced in the aftermath of the elections which made it difficult for any state to act decisively. The government's immediate priority was to deal with the particularities it inherited and if there were priorities established, these involved creating the necessary conditions for future change. This period of policy change can be characterised as one of 'accommodation and adaptation' as the new Ministry sought to come to terms with its positioning and assert its authority.

But these contextual realities tell only part of the story. They may even excuse the policy actions that followed the elections. The Ministry, however, did have choice, as de Clercq (1997) points out. The choices it made were to engage in a process of developing frameworks in a participatory fashion conducted by review committees, instead of prioritising specific areas for intervention. The range of these committees was wide and tackled every aspect of education. These included a new framework for education (National Education Act), the introduction of a new learner-led, outcomes-based curriculum (Curriculum 2005 and the National Qualification Act), the restructuring of the further education sector (the National Commission for Further Education), the reorganisation of the funding and governance of schools (South African Schools Act), and the recognition of the need for new forms of educational management development (National Task Team for Education Management Development report.

Samoff (1996), has critiqued policy change in South Africa arguing that much of what has been produced is essentially frameworks or symbolic policies with a singular lack of attention to developing strategic priorities and singling out finite areas of intervention. This is a telling criticism as it was beyond the capacity of the new Ministry in 1994 to deal with all areas of education and consequently a focus on one or two areas of educational change might have created greater impact.

1.2 Equity, Redress and Justice as policy concerns

The apartheid system of education resulted in entrenched gross educational disparities and inequities between different racial groups. The need for rectification and parity in all aspects of education was thus a necessary imperative in a new democratic education system. The demand for rectification was captured in the commitment to equity and redress as cornerstone principles of all educational policies. However, there is much confusion about the notions of equity, redress and justice. This section teases out some of the different understandings of equity, redress and justice contained in South African educational policy texts [3].

Samoff (1996), writing about educational policy development in South Africa, argues that equity should be differentiated from equality. He argues that whereas the former refers to justice, the latter refers to the 'principle of sameness'. Equity, according to Samoff (1996), includes the distribution of educational services so that all may be able to be equal. Equity in this approach can be perceived as a strategy to achieve equality. Equality, on the other hand, implies that in a democratic system no one should be treated differently.

In contrast, Taylor et al (1997) and Codd et al (1997) are sceptical about the use of the word equity. Taylor et al (1997) maintain that to view 'equity alone is to stress already a particular construction of justice, which is linked more to administrative concerns of how resources ought to be distributed

than to cultural and moral concerns'. Equity is thus about how resources might be administratively distributed in society.

Equity and equality are underpinned by competing understandings of the concept of justice in education. The distinction between equity and equality invoked by Samoff's (1996) analysis of educational change in South Africa is similar to Rawls (1972) two principles of justice. The first Rawlsian principle invokes justice as the equal distribution of goods and services in society. The second principle allows for 'deviation' from the principle of justice as 'fair treatment' on the grounds of ensuring equality and on the basis that unequal distribution might be to the advantage of the least powerful in society. Nozick (1976) modifies the Rawlsian notion of justice by suggesting that people are entitled to what they produce, a theory of justice as entitlement (just deserts) [4].

Both notions of justice, as Taylor et al (1997) point out, are underpinned by an individualist, neo-liberal philosophy which foregrounds equality of opportunity for individuals. Justice in this conception is a property possessed by individuals. In contrast, Gewirtz (1998) and Riddell et al (1998) forward a relational concept of justice in which justice is not only about the distribution of resources and goods but also implies a concern for the recognition of difference and mutuality, and changing the oppressive conditions in which individuals find themselves [5].

Writers such as Fraser (1997), Gewirtz (1998), Taylor et al (1997), Young (1990), and Apple (1996) highlight the ways in which current policy initiatives construct a narrow view of justice. This view captured in the writings of Rawls (1972), and Nozick (1976) tends to present a charity-based assumption of equity and justice in which justice is distributed on the basis of the deficits of the needy in society, or in policy parlance, 'targeting the most needy'. In other words, justice is about rectifying individuals' deficiencies so that all may have equal opportunity. Such a conception of equity and justice tends to ignore the relational properties of justice and the ways in which the broader structural features of society produce unequal outcomes. Targeting individuals for corrective action, for example, provision of equal opportunity policies, would thus not necessarily alter the unequal structural arrangements in society. In this argument, the privileging of distributive forms of justice, therefore, not only fails to recognise difference but it tends to produce ameliorative rather than fundamental approaches to dealing with inequity and injustice.

In the South African context, equity, equality, redress and justice has expressed themselves in policy terms in divergent and often contradictory ways. First, South African educational policy discourse tends to use equity and redress in the sense of the Rawlsian second principle of justice. Equity and redress are thus programmatic responses, captured in the philosophy of affirmative action or positive discrimination which is constitutionally enshrined, to provide resources to those who have been most disadvantaged. In the policy context of South Africa, one strand of the discourse of equity and redistribution is thus about distributional justice and is directed towards ratcheting up those who have been marginalised under apartheid.

The policy of achieving equalisation, the 'balance book' approach to equity, redress and justice, expresses itself in the policy of rightsizing which the Ministry of Education argued would allow for equitable teacher: pupil ratios in favour of black schools. In funding, this approach finds expression in the notion of 'backlog' and 'redress' funds made available to educational institutions. The clearest example of the second order Rawlsian principle was the Reconstruction and Development Programme (RDP) and School Feeding Programme (Kallaway 1995) which made monies available to disadvantaged schools to bring about parity.

Educational policies in South Africa foregrounds access to educational opportunities (equality of opportunity) and seeks to create conditions for facilitating access. The discursive construction of the notions of equity, redress and justice is based on a defence of different treatment in order to equalise opportunity for all. Equity, redress and justice are thus conceived as properties of individuals which need historical rectification so that all could be, sometime in the future, treated the same. The second order principle of Rawls provides the justification for affirmative action programmes as a short-term strategic initiative to reach this first-order state.

Justice and equality as differential distribution stands in contrast in the South African context to the notion of equity and equality as uniformity and standardisation across the education system[6]. This conception of equity and equality excludes any consideration of difference as a criterion of provision. For example, it extricates race as a category of provision and policy analysis. The policy subject/target becomes the pupil instead of the Black or White or Indian or Coloured pupil and consequently ignores how race intersects with gender and class to produce unequal outcomes. In other words, the educational policy discourse, in emphasising uniformity in educational provision, tends to ignore historically situated and developed inequities. The object of policy regulation is, in the language of the White Paper (1995), 'the establishment of uniform norms and standards'. In terms of funding, equity and redress in this approach finds expression in equalised per capita expenditure for all pupils and students.

It is important to note that the above distributive conception of equity, redress and justice does not imply redistribution in the sense of taking away from others, specifically the privileged white minority. The negotiated settlement had all but put paid to the possibility of redistribution as a mechanism of justice. The conditioning of distributive justice means bringing everyone up to a certain level (however defined) without taking away from anyone. Previous patterns and consequences of the provision of education are frozen. This notion of equity is interestingly enough was echoed by O'Dowd (1991: 6), Chairman of Anglo American and De Beer's Chairman's Fund, who indicated that:

> Unless it is brought about by economic growth, any advantage give to some has got to be taken from others, in the process creating a precedent for others to try to take it for themselves.

The key policy challenge is the way in which such an approach to justice could be effected. A possible solution would be to provide for additional resource inputs, to which the new government is committed, but unable to deliver, as the needs are great. The School Register of Needs (SRN) commissioned by the Ministry of Education indicates that an additional 12 billion rands would be needed to simply equalise resource distribution across all groups. Thus, it is unlikely that the new government may be able to muster sufficient resources to overcome the legacy of apartheid education. The other option, which is addressed later, is through choice and user fees.

In summary, in educational policy discourse in South Africa, equity, redress, equality and justice are expressed in two ways. First, as expressions of historical rectification in order to promote equality of opportunity. It is in this sense that the word redress is used as a signifier in educational policy texts. This notion does not imply redistribution in the form of redistributing substantial positional goods and resources from those who have been previously advantaged. Second, redress, equity and justice are located in a discourse of uniformity and standardisation operative according to the principle of sameness. Specific identities are displaced in favour of the essentialised construction of citizens as pupils, teachers, administrators and so on. Justice is truly blind and equality of sameness prevails.

1.3 Democracy and participation as policy concerns

An important influence that underwrites educational policy in South Africa is the commitment to extending citizen democracy and participation in education as expressed in the first White Paper on Education and Training (DoE 1995) in the context of a new democratic state.

The new democratic state that emerged in South Africa after 1994 was greeted with multiple and contradictory demands. First, it was expected to deliver a more just and humane society in a climate of rising expectations and hopeful promise. Simultaneously, the state was expected to provide the conditions for economic growth and development. The state was thus positioned as the modernising instrument for advanced capitalist accumulation in a context of increasing globalisation and financial austerity. Badat & Wolpe (1993) refer to this problematic as the equity/development tension. Second, it was presumed that the state would unify a divided society without threatening the white population. Restitution was therefore to take a limited form. Third, the state was expected to be responsive to the will of the people and to guarantee increased participation and extend democracy in society. In particular, the state was expected to establish a sound and vibrant relationship with organisations in and of civil society. The new South African state was therefore expected to fulfil at least three different functions, namely, ensure distributive justice, provide the conditions for capital accumulation, and ensure greater responsiveness and participation in forging unity/nationhood (the rainbow nation/state). These functions capture the contradictory character of the South African state which was expected to meet the dual imperatives of securing for capital the conditions for accumulation, and simultaneously developing a legitimate hegemonic discourse through meeting the needs and expectations of citizens (Offe 1984 & 1996 & Gordon et al 1997) [7].

Dale (1997) suggests that the modern state can be considered to have undergone a change in the form of a 'hollowing out' with some state activities taken up by supra-national (and supra-international agencies) whilst others are lost downwards to sub-national or non-state bodies. He further suggests that this does not necessarily imply a loss of state power or its withdrawal so much as a disaggregation of the state and a re-definition of what the state is[8]. The 'hollowing-out' of the state as an upward and downward loss (or more accurately redefinition of roles) is divergently constituted in post-apartheid South Africa. The new post-apartheid state is, as a conditionality of the negotiated settlement, internally re-organised into a National state at centre and dispersed, decentralised states at sites (provinces) [9]. The semi-federalist decentralised [10] constitution of the state involves different activities and mechanisms of co-ordination between the centre and the sites. The national centre for education is responsible for the funding of the sites but is not involved in the management and control of schools within the sites. In Dale's (1997) terms, the state funds but does not deliver and provide.

The associative bond between the centre and the sites is created through a process of juridification. This involves the central Ministry of Education setting uniform norms and standards through legislation that prevail across all sites. Legislation is thus used as a constraining mechanism to control the actions of internal state actors. The process of juridification (re)sites conflict between the centre and provinces from the political arena to the judiciary. As witnessed in a number of important legal challenges to the powers of the National Minster of Education[11], the battle between the centre and sites is constituted in the legal domain. The legalisation of challenge in turn redefines political battles of control. The only way to overturn legal decisions that run contrary to a particular political group is to muster sufficient political support in general elections to alter the national constitution. Thus, the argument advanced here is that the state is still powerful, albeit differently so.

In the process of juridification, the forms of regulation undergo significant alteration. A key characteristic of state control under apartheid was that it was hands-on, direct and before the 'act'. The apartheid state adopted a style of management that directly intervened in processes of educational provision and delivery. In the post-apartheid state, control is indirect, 'after the fact', and exercised through controlling the outcomes rather than the inputs. Control is thus about setting limits and ensuring that goals are ascribed to and achieved. Thus, for example, provincial sites are responsible for achieving the national goals of equitable provision of educational resources and services.

The constraining nature of the semi-federalist South African state is reflected in the National Norms and Standards for School Funding (NNSSF) Bill [12]. The ability of the NNSSF to effect equity and redress in South African education is constrained by two factors. First, as the document acknowledges, 'the National Ministry of Education does not decide on the amounts to be allocated annually for provincial education departments. .... Each province determines its own level of spending on education ...it follows that the national norms for funding schools cannot prescribe actual amount in Rands per learner' (DoE 1998a: 11). Thus, the semi-federal structure of education makes direct intervention difficult and instead that state is reliant on the 'provinces to *honour* the state's duty' (DoE 1998a:12 my emphasis). Secondly, personnel expenditure is a result of agreements with national teacher unions and as such the state cannot prescribe actual spending. However, it can determine national policy in respect of educator provisioning. The NNSSF thus capture the dilemmas of the new state in its attempt to restructure education in order to effect equity and redress.

In this new context of funding, the national state takes on a monitoring role in which it assesses the 'effects of new budget allocation on the current inequalities in school provision, the levels of fee charging' (DoE 1998a: 14). The evaluative nature of both the central and provincial governments is most transparent in, for example, the proposal that governing bodies that wish to take on more responsibility for managing aspects of schools (Section 21 of SASA) will be subject to a 'managerial capacity checklist' devised by provincial education departments (DoE 1998a: 27).

The internal constitution of the state has a direct impact on the relationships between the state at centre and institutions, and between the state at sites and institutions. The centre in post-apartheid society acts as the guarantor and protector of the needs, rights and privileges of all citizens expressed in the constitution and in national development priorities. The centre is the final instance arbiter and rectifier of any possible problems in the fulfilment of the needs and wishes of citizens. The state at the provincial level is the key mediating agency between the state at centre and institutions. The sites are responsible for the day-to-day management, governance and organisation of schools. Conflict between the centre and institutions in this context is first felt at the provincial level.

The state at centre further redefines the role between sites and institutions through the SASA and consequently redefines the notion of citizen participation in society. The SASA downloads or trickles down responsibility for day-to-day school management to the institutional site, with the state at sites now taking responsibility for overall monitoring and evaluation of actors' behaviour within a national framework [13]. The institutional site of schooling thus sits at the nexus between juridical regulation and self-management.

In devolving control to schools through SASA, the post-apartheid state has introduced in South Africa the key defining moments of educational restructuring in the international context, namely choice and participation [14]. In the South African context, one of the important features of the discursive construction of choice and participation is that it blurs the values of the political left and

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the right. Thus, the progressive rhetoric of deepening democracy, extending participation and allowing for an active civil society is employed to justify choice. Choice in education underpins the NNSSF document which states that 'SASA *imposes a responsibility* on all public school governing bodies' to raise additional resources (DoE 1998a: 12 my emphasis).

The naivety of the document is reflected in the assumptions made about the likely behaviour of the new school governing bodies established under the SASA. Thus, the NNSSF expresses surprise at the fact that 'the provision of the Act appears to have worked thus far to the advantage of public schools patronised by middle-class and wealthy parents' (DoE 1998a: 12). This is not suprising given the structure of SASA. However, race does not disappear as an issue. Instead, the relationship between race and class continues, albeit in different ways [15]. It is therefore ironic (to borrow a word from the document) that this outcome is blamed on the past and assumed that the NNSSF will counteract this process.

The key contradiction of the discourse of NNSSF is the assumption of the behaviour of the new school governing bodies. The document assumes that new school governing bodies will make information available to all parents, and that predominantly wealthy and middle class bodies will take into consideration 'the financial circumstances of all parents as a whole in determining school fees (DoE 1998a: 13). The assumption of middle class benevolence is naive to say the least and presumes that the new power given to school governing bodies will be to the benefit of the common good [16].

The proposals regarding fee exemption could be argued to be consistent with the desire to grade user fees in relation to parental income. However, the key problem surrounding the proposal is at the level of implementation. First, the conditions for fee exemption do not, in the absence of any monitoring mechanism, prevent schools from 'screening out' those who are unable to pay. Thus, the main beneficiaries are likely to be parents who already have children in high fee-charging schools [17]. Second, the NNSSF document shifts the onus for determining who is exempt and who is not to school governing bodies. In so doing, the school bears responsibility for exclusion rather than the state. The state thus recedes as an active interventionist agent and passes the responsibility for ensuring equity and redress to individual school governing bodies. Third, the NNSSF document assumes a high degree of knowledge on the part of parents to apply for exemption. This, as Ball (1994) argues, is likely to benefit the middle classes who possess the necessary cognitive capital to manipulate the system to their advantage.

The proposal concerning fee exemption is based on two assumptions about individual behaviours. First, it assumes that parents will act with honesty and faith in declaring their correct income. Thus, it assumes that parents are able to act for the good of the school community as a whole. Second, it assumes that school governing bodies have the skills, resources and capacity to track parents reported income. For example, how is this to be secured for those who are self-employed?

The SASA and NNSSF texts thus not only reconstitute the basis of citizen choice and participation at the institutional site. They also reduce, at one level, the extent to which the provincial site is able to leverage the school. In this respect, the texts open a possible conflictual relationship between the provincial and institutional sites, which consequently further isolates the state at centre from the effects of struggles. At another level, the SASA, in circumscribing the actions of provincial sites, opens the possibility of conflict within the state between the centre and the provincial sites.

The new relations of control and regulation that the post-apartheid state sets in motion, redefine the interaction between state at centre and provincial sites and civil society, and the forms of citizen participation espoused. Civil society through the SASA is, on the hand, atomised into discrete

individuals who intersect with the state at the institutional site. The atomised individual uses her/his new found authority and responsibility to leverage maximal benefits from schooling. Further, the post-apartheid state through the SASA displaces conflict about race, gender, ethnicity, religious identities, and sexual affiliations to the institutional site of schools.

However, the displacement of conflict does not imply that the state is absent. Instead, as noted earlier, the state fulfils a monitoring and evaluative role. The state creates semi-governmental structures responsible for ensuring compliance with policy goals. The Gender Equity and the Human Rights Commission are two examples of structures that have the right to intervene in order to protect specific policy goals. However, they are often reactive rather than proactive structures. The state through such structures acts a guarantor for basic rights and its key role is evaluative rather than directive.

On the other hand, civil society in its organised form intersects with the state through the endorsement in educational policy texts in South Africa for the establishment of multiple public fora. The various educational policy texts all make reference to the creation of advisory bodies which would comprise of stakeholders and would be involved in consultations around policy development at all levels of the education system. The establishment of multiple fora for policy development is consistent with the ANC's policy commitment in their Education and Training Framework (1994) which stated that the creation of such structures was an important condition for new relationships between the state and civil society in a post-apartheid society. Examples of educational advisory bodies in South Africa are the Council for Higher Education (CHE) and provincial education fora [18]. The creation of advisory bodies as public fora for civil society participation has elicited diverse commentary. Affirmative critical theorists (see Moja et al 1995) see these fora as important connectivity mechanisms in creating new forms of governmentality in the modern state. Sceptical critical theorists see such fora as a weakening of participation by civil society structures and consider it to be part of the continued demobilisation of mass-based civil society organisations in South Africa. The creation of multiple public fora represents a restructuring of the state's relationship with individuals in that such fora become the conditions for active collective citizen participation, albeit in diverse and contradictory ways.

However, the process of establishing public advisory bodies ignores the differential capacities of organised civil society structures. Further, they tend to ignore the racial and gender inequities which constrain full and effective participation in such fora. An obvious example of the differential capacities for participation was during the policy development process of the SASA where of the 1700 submissions received, the majority came from previously white structures that have access to immense resources for policy intervention. Public fora thus differentially distribute democratic resources in society and tend to reflect and reproduce asymmetrical power relations.

1.4 Economic and global influences

The influence of the economy and globalisation on education is a subject of intense debate, discussion and speculation (see Brown & Lauder 1997, Smyth 1993, Levin & Kelley 1997, Hicknox & Moore 1992, Avalos 1996). In the South African context, the role of education and its relationship to economic development and globalisation has provoked much concern and anxiety (See for example Chisholm & Fuller 1996, Natrass & Ardington 1990, Chisholm et al 1998, Osborn 1997, Adalzadeh 1997, Heinz 1997). In general, three different accounts regarding the relationship between education, the economy, and globalisation can be discerned in South African educational policy discourses[19].

The first discursive linking of education and the economy is reflected in the 'social welfarist' project which links economic development and growth to the provision of social services and opportunities for all citizens. The satisfizing of citizens' needs is the engine that will ensure commitment and productivity which will in turn stimulate economic growth and development. The social welfarists posit a strong correlation between social needs and growth. Apartheid in this perspective became dysfunctional to economic growth as it constrained and underdeveloped the full potentiality of the nation and consequently resulted in economic stagnation and decline. The South African government's Reconstruction and Development Programme (RDP) which foregrounded developmental priorities as the key to sustained economic growth in South Africa captures this idea. Investment in education is thus projected as a necessary condition for sustained capital accumulation and a solution to the crisis of apartheid. Racial desegregation, equity and justice become linked to economic growth. In other words, desegregation and distributional justice make good business sense.

The second discursive moment emerged from two related processes. First, there was a sharp and growing awareness that the scale of injustice and disparity would require far more investment than the state was able to muster and justify. Second, the post-apartheid dividend of inward growth and external investment was not as huge as expected. In fact, the post-apartheid economic boom was based mainly on speculative trading. Productive investment was slow and not significant. In these changed conditions, macroeconomic stabilisation and an export-led growth strategy were considered key imperatives for change. In this context, the South African state committed itself to the Growth, Employment and Redistribution (GEAR) strategy. The GEAR strategy is a macro-economic framework that is based on an export-led strategy with reduced tariff barriers to attract foreign investment and stimulate growth. It is aimed at reducing the government's financial deficit and is focused on economic growth with a projected growth figure of 6% per annum by the year 2000. Privatisation of essential state assets and removal of exchange control are central to the GEAR strategy. Growth is prioritised in this approach and is understood to provide the stability and resources that are a pre-condition for greater distributive justice.

The third discursive constitution of educational policy is the project of 'left modernisation' (Brown & Lauder 1992 & 1997). Left modernisers seek an approach that recognises the limits and constraints of a solely 'needs-based development' strategy and seeks to avoid the 'trickle down' economics of GEAR. Writing in the developed world context, Brown & Lauder (1997: 178-180) put it as follows:

> At the top of their agenda is a commitment to investment in human capital and strategic investment in the economy as a way of moving towards a high-skilled, high-waged, 'magnet' economy. ... Education and training opportunities are therefore pivotal to this vision of a competitive and just society. .... Invest in education and training to enable workers to become fully employable. In this account, social justice inheres in providing all individuals with the opportunity to gain access to education that qualifies them for a job.

Education investments thus can produce the kinds of learners and graduates able to cope with the global context and act as agents for economic development [20].

In each of the three accounts, the global is conceived differently. For social welfarists, the global context is a threat to social justice as it prizes competitiveness above all other concerns. And competition makes local and national economies that are struggling to develop vulnerable and consequently forces them to abandon concerns of social justice and equity. Social welfarists turn to the rest of Africa which suffered under the World Bank's (WB) Structural Adjustment Programme as a prime example of the decline in social service provision under programmes of financial austerity.

The growth advocates share a deterministic and fatalistic reading of globalisation. GEAR advocates would cite the failure of the welfare state and the inevitability of international economic globalisation as necessitating prudent management of the economy. Extensive and expanded social service provision cannot be sustained under conditions of slow economic growth and an expansion of the state's deficit cannot be condoned. Deregulation and the market would provide for economic expansion and expanded social service provision without burdening or stretching the state. The state in GEAR concentrates on ways in which it can contain public spending and drive down the consumption of social goods that makes demands on state expenditure. The underlying assumption of GEAR, typified by Crouch (1998a: 6), is that no 'country has spent its way to development' and that 'no country with deficits above 3% and high consumption patterns would engender development'

The left modernisers see globalisation neither as a historical inevitability nor as a uniform linear process. The negative effects of globalisation can be countered by investment in education and a more flexible approach to labour and the economy. They believe that given the economic transformations that have occurred, nation-states will be able to compete, only if they have the right human resources. This view is best captured in the following words from the Department of Education regarding the introduction of outcomes-based education (OBE) (cited in Jansen 1998: 324)

> Allied to the vision of South Africa as a prosperous ... internationally competitive country, is a vision of its people as literate and productive human beings

> Equally OBE is argued as facilitating human resources development and potentially contributing to a vibrant economy

Despite the ideological and political differences between the three discursive positions, they all share a common commitment to educational advancement and reorganisation. Education is regarded as a 'good thing' and there is a need for educational investment. Every citizen should have access to educational opportunities. The differences stem from the nature and content of the envisaged educational investment. However, Levin & Kelley (1997: 340) succinctly point out that 'education is potentially effective in accomplishing much of what is claimed for. Yet, that effectiveness crucially depends on the existence of complementary inputs. In the absence of complementary inputs such as adequate labour market absorptive capacity, education is not likely to be as potent as the promises of its advocates'. The expectations of the education system in a transitional society are, as experience shows elsewhere, overstated, unrealistic and far too ambitious.

In the above account, the educational terrain is interpolated in the economic and global realm. However, education reform in South Africa is also a constitutive factor in the process of globalisation and economic reforms in particular ways. First, education reform in South Africa projects a vision of the global as the site of high-skilled, high-end, productive employment. The image only accords with a small fraction of the economically productive with the majority in low/semi-skilled employment. Second, educational reform is cast in the framework of a modernising system in harmony with modern global developments. This image is an attempt to accentuate the positive and functionality of post-apartheid educational policy, a process of symbolic policy change. However, Christie (1998) and Jansen (1998) indicate the shortcomings of an approach that fails to take into account existing debilitating educational realties. As Jansen (1998: 323) notes in relation to OBE:

> the language of OBE and its associated structures are simply too complex and inaccessible for most teachers to give these policies meaning through their classroom practices

Third, as noted earlier, educational reform is projected as the panacea to the challenges of economic reform and globalisation. It is the modernising educational system through the instruments of the various policy texts that the solutions to South Africa's economic problems are to be found.

In these ways, educational reforms in South Africa mediate the economic and global spheres. They are constituted as progressive, full of promise, and holding the promise of a better future. The fatalism of the social welfarists (RDP advocate) and the inevitablist discourse of the GEAR champions is translated into a message of response to the new era of economic and global transformations. In this particular distillation, the Rainbow Nation tales its place as an active global citizen reconstituting the new economic and global transformations within the South African context.

1.5 Efficiency, Effectiveness and quality

One of the many changes in educational restructuring has been a new lexicon of efficiency, effectiveness and quality in the organisation, governance and funding of education and schooling. The strength of this focus has been that it has turned attention to the internal dynamics of schooling and has foregrounded the need to move away from the distributional problem of access to considering the question of access to what? (Dunne & Sayed 1999). Crouch and Mabogane's (1998b: 28-30) paper is a welcome contribution to discussions of educational policy in South Africa as it indicates that

> Gross lack of access to South African educational institutions appears largely mythical. ... The analysis of the indicators thus reveals a deep quality problem, as opposed to a large raw access problem. ... The key task is now to better manage the quality of the system that *already* appears to be developing something close to access to compulsory education of at least 12 years duration. (emphasis in original)

In South African educational policy discourses, the following meanings of the new lexicon can be found. The notion of quality surfaces is understood in educational policy discourses in South Africa as the need to ensure that learners have access to educational opportunities and resources that they have been denied under apartheid. Quality thus used signifies an attempt to secure distributional justice and equality. Quality is also used in many policy texts (see SASA 1997 as an example) to signify a desirable goal for education. The new education system, the argument goes, is designed to ensure quality learning and teaching. In this respect, quality is used as value-orientation alongside principles such as non-racism. The notion of quality is also used as a justification for the reorganisation and restructuring of education. As Lawton (1992) and Caldwell (1993) point out quality is advanced as a justification for fundamental restructuring in that the previous systems of education are perceived to be of low quality.

One of the aspects that is ignored in understanding the notion of quality in educational policy in the South African context is the way in which it serves to legitimise new forms of subtle class-based rather than raced-based, inequities. In the SASA where user fees are justified on the grounds that parents who want to maintain or better the quality of education for their children are prepared to pay for it, the concept of quality implies more than raw access. It crucially involves an issue of to what and where you get educational access and opportunity. Thus, the new defining source of inequity is not only between those who are educated and those who are not, but also between those who obtain particular kinds of education. In other words, the notion of quality implies a grading of an individual's educational experiences with the middle class obtaining education in privileged and well resourced institutions. For example, in the UK, the quality of higher education depends on where the qualification is obtained.

The notion of quality discussed above relates directly to the notion of effectiveness. In an international restructuring context, the impetus for new forms of educational organisation, is rooted in the perceived failings and ineffectiveness of systems. For example, the *Nation at Risk* text in the USA highlights the ways in which the American education system is failing to prepare learners for the 21st century and the ways in which the system is performing badly, in subjects such as science compared to other countries. Lawton (1992: 142-143) states that 'ineffective educational systems, in short, were indicted, for failing in the role of developing human capital for the benefit of individuals and society'. In the South African context, effective education is about creating a structure of education that was able to deliver on the new educational values of equity, redress, and so on. The clearest expression of the notion of educational effectiveness is found in human resource development programmes where it is argued that the system of education needs to be restructured so that it can develop the potential of all. An example of poor quality and ineffective education that is cited is the poor performance of South African students in international cognitive assessment exercises. South African pupils ranked 44 in assessments of mathematics performance compared to other countries.

The concept of efficiency is one that has concerned many analyses of education (see Woodhall 1997, Lawton 1992). In the South African context, the concept of efficiency was first introduced in the NEPI policy discourses and its roots were primarily in the private sector education think tanks such as the Urban Foundation. Efficiency in the NEPI discourse was considered an important value and principle in the articulation of alternative progressive educational policy options[21]. More recently, Crouch (1997) and Crouch & Magobane (1998a, 1998b) have written extensively on efficiency in education. There are a number of differing conceptualisations of efficiency and inefficiency in South African educational policy discourses.

First, efficiency is constituted in relation to the system of apartheid education. Apartheid education was considered inefficient to the extent that it entailed multiple, fragmented education departments. In an administrative sense, inefficiency arose from wasteful duplication and an over-bureaucratised system. The post-apartheid education dividend was conceived as an outflow of monies resulting from the creation of a single, unified and streamlined education system. The reality is that, whilst a unified education system has been established, the massive inward administrative savings have not materialised for a number of reasons[22]. Apartheid education was also beset by internal allocative inefficiency in that huge resources were devoted to the white system with neglect and underfunding of black education. White education and Coloured education was higher in terms of input allocation due to higher teacher remuneration costs. The higher salary costs were related to the differentials in experience and qualifications of White and Coloured teachers and lower pupil-teacher ratios (Crouch 1997, Kallaway 1995).

Second, efficiency in post-apartheid education policy constitutes a reversal of apartheid education policies. Efficiency is thus about equally distributing resources to all students and equalising administrative capacity across the system.

The most important aspect of post-apartheid educational policy's efficiency drive is in relation to the teaching profession. Teacher costs in South Africa, similar to other countries in Sub-Saharan Africa are extremely high. Most provinces spend between 80% - 90% of their budgets on teacher salaries. Thus, the majority of the budget is tied to recurrent committed expenditure leaving very little for spending on resources such as books and equipment. This is perhaps a result of the constraining overall education budget. However, the overall spending on education in South Africa is about 6% of GDP which is relatively high compared to most countries. Overall budgetary increases are unlikely in a context in which the state is committed to curbing expenditure and in which only 'very small real

increases in public spending' are anticipated over the next few years (DoE 1998:9). Consequently, teacher remuneration will continue to consume a substantial proportion of the salary budget for the foreseeable future (DoE 1998b) and the NNSSF document therefore refers to 'managing down' teacher personnel costs to 85% of overall costs. The emphasis of educational policy in relation to the teaching force is thus, as the MTEF (DoE 1998b) report indicates, focused on the need to enhance the productivity of teachers as a way of improving efficiency.

A key aspect of teacher efficiency is to lower unit costs by various measures including increasing teacher: pupil ratios (proposal of teacher: pupil ratios of 1:41 over a few years in secondary schools), increase teacher workload (the MTEF proposes 1800 hours of teacher work per year), decrease the number of substitutes used in teaching, and to redeploy staff. As the MTEF (DoE 1998b: 42) report puts it:

> The personnel chapter indicated that it is not realistic to decrease the cost of qualified teachers. What is required is an increase in productivity of teachers and other inputs in the education system.

Improving teacher productivity is thus considered to be, as the tone of the MTEF report suggests perhaps, the key efficiency gain in education. The suggestions regarding teacher productivity, which forms a substantial part of the MTEF Report, are similar to what Whitty (1997) refers to as the intensification of teacher work which includes increased workload, increased surveillance and monitoring, and the pitting of school communities against professionals under the guise of accountability, and public responsiveness.

A third sense of efficiency that permeates educational discourse is that of wastage, and the relationship between input cost and performance outcomes and improvements. Indicators of wastage cite the low matric pass rates of African pupils (only about 25% of African students obtain a matric pass), the high number of African pupils that repeat particularly at the primary level, and the number of pupils years African students invest for a 12 year matric certificate. Crouch & Magobane (1988b) indicate that the system expends 30-40 years of African pupil years for a 12 year matric pass. This measure of efficiency is one of ensuring successful outcomes in terms of investment of time and input costs for learning. Efficiency is understood to include similar or improved levels of performance with lower unit costs, improved performance without adding new resources, and redress to the extent that efficiency savings can be used for redress purposes. However, as the EPU (1997) points out: 'there is little empirically based research which establishes the relationships between changing inputs and costs with improved performance'.

By Way of Conclusion

This paper has highlighted some of the key discursive concerns that have shaped, and will continue to shape post-apartheid education policy. Five principle concerns have been discussed, namely, the historical legacy of apartheid education, equity and justice, democracy and participation, economy and globalisation, and efficiency, quality and effectiveness. These concerns are indelibly stamped on all the policy texts that have been issued by the Ministry of Education post-1994.

The concerns are shared by most countries undergoing educational change and renewal. However, they take on particular and specific inflections in the South African context. They thus represent a continual mediation between the concerns of nation-states and those of the emerging global order.

In marking a tracer path for educational policy change in South Africa, this paper has not sought to engage in the analysis for policy. It does not seek to 'problem solve'. Instead, it has charted some of

the conceptual shift in South African educational policy, highlighting the continuities and discontinuities, the process of mediation, the conceptual tensions, and the different sets of interest that influence the process. This conceptual exploration indicates the potent symbolism of contemporary educational policy development in South Africa. In doing so, it highlights the space educational reform in South African open and those it closes in the field of practice, which as Jansen (1998) argue, has largely been ignored.

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ENDNOTES

[1] Paper read at the American Educational Research Association ' Creating Knowledge in the 21st Century: Insights From Multiple Perspectives' Conference, New Orleans, USA, 24-28 April 2000. Address for correspondence: Centre for International Education, University of Sussex Institute of Education, Education Development Building, Falmer, Brighton, BN1 9RG. Email: y.sayed@sussex.ac.uk.

[2] See Badat (1995) for a comprehensive review of the context of transition. Badat (1995) argues that the new state was constrained by a number of factors that emerge from the particular path to change taken in the South African context. This section focuses on those that directly impinge on education.

[3] A selected review of the literature in the Journal of Education Policy over the last 10 years for example indicates that implicit in much of the criticism of the influence of markets in education are different notions of equity, redress, equality and justice (See Gewirtz et al 1995, Ball et al 1995, Ball 1994 as examples). However, there have been few attempts to theorise explicitly these concepts. Notable exceptions include Grace (1994) and Ranson et al (1997) who argue that understanding educational policy in the current context requires an explicit understanding of these notions.

Grace (1994) suggests that what is required in policy is a strategy of 'democratic counter-advocacy' which stands in opposition to the narrow economic sciences approach which invokes policy strategies under the guise of neutrality

[4] See Gewirtz 1998, Hatcher 1998, and Riddle 1998 in a special edition of the Journal of Education Policy for a comprehensive review of the different and contrasting notions of social justice and equality.

[5] There is much debate and writing about the differences and linkages between distributive and relational justice in various works. See Gewirtz (1998) for a comprehensive review. For the purpose of this paper, the key issue is the simple point that a concern with distributional justice in the South Africa context may obscure a need to restructure fundamentally the conditions of oppression.

[6] This notion of equity and justice echoes Rawls first principle of justice as sameness.

[7] These contradictory demands lead Gordon et al (1997) to argue that states in capitalist societies are both constrained and enabled vis-à-vis capital.

[8] Similar analyses of the role of the state can be found in articles about the market in education (see for example Whitty 1997, Ranson et al 1997, Gewirtz et al 1995, Ball 1994, Lauder & Brown 1988) wherein it is suggested that the modern state redefines its role with respect to the funding, regulation, and provision of education.

[9] The notion of the state at centre and state at sites is used in the descriptive sense of specifying the relationships of government set up by the constitution which has carved up South Africa into nine different provinces. A fuller exploration of the notion of the state and civil society is developed in an earlier paper by Carrim and Sayed (1992).

[10] See Sayed (1995 & 1999a) for a discussion on the discourses of educational decentralisation in South African education.

[11] An important challenge was brought against the National Minister of Education by the Democratic Party and the Inkatha Freedom Party which argued that the National Education Act which specified the powers of the National Minister undermined provincial autonomy as set out in the constitution. The Constitutional Court ruled in favour of the Minister. Sayed (1999a) provides a fuller discussion of this struggle.

[12] Following the SASA, the Ministry of Education issued the NNSSF bill in October 1998. The NNSSF (DoE 1998:5-6) is designed to establish 'the national norms and minimum standards in terms of the South African Schools Act, 1996 and came into effect on April 1999. The NNSSF covers the ways in which provinces should fund schools (both public and independent) and provides guidelines for fee exemption.

[13] In earlier papers (Sayed 1999a & 1999b and Sayed & Carrim 1998) a strong critiques is developed of the SASA in respect of the implications of user fees for the goals of equity, justice and redress.

[14] The review of notions of choice and participation in a market (see for example Ball 1993, Ball 1994, Ball et al 1995, Gewirtz et al 1995, Munn ed. 1993, Vincent 1996, Wells 1997, Fine 1997, Brown 1997) reveal two different dimensions of the debate. First, is the advocacy, elaboration and critiques by researchers of either market or democratic egalitarian approaches to educational choice and provisions. See Chubb and Moe (1990) for an elaborate account of the virtues of choice whilst the works of Ball and colleagues (Ball 1994, Gewirtz et al 1995) and Hatcher (1998) highlight the critique of choice and its effect on further stratification and inequity in society. Second, are researchers working in the empirical tradition (both qualitative and quantitative) who are engaged in empirically determining issues such as how choice occurs, whether more choice results from greater deregulation through markets and whether markets result in privileging of some and greater inequity. See works by researchers such as Gewirtz et al (1995) & Fitz (1998).

[15] See Sayed 1999a. However, as the Grove saga reveals, middle class schools are keen to project an image of non-racism and concern for the poor. They would therefore encourage, as Maree & Lowerhenz (1998) [SGB members from Grove] state, children from the poor and other 'races'. However, this is a question of political survival and ensuring that the schools projects an image of non-racism so that it can attract middle calls parents.

[16] The NNSSF (DoE 1998a: 40) proposes the following basis of fee charging and exemption:

- If the combined annual gross income of parents is less than 10 times the annual fee, then full exemption is granted
- If the combined annual gross income of parents is less than 30 times the annual fee, then partial exemption is granted
- If the combined annual gross income of parents is more than 30 times the annual fee, then no exemption is granted

[17] See Sayed (1999a & 1999b) for a more developed critique of this point.

[18] See an earlier paper by Carrim and Sayed (1998) for a critical discussion of the forms and understandings of participation in post-apartheid educational policy.

[19] It may be argued that the three-fold distinction is not sufficiently nuanced and distorts the similarities between the positions. The contention of the paper is that these three tendencies can be discerned in educational policy and that at the level of recommendation and practice, they offer divergent and contradictory options. Nonetheless, the paper does recognise some similarities between the three positions.

[20] Also, see Reich 1997 for an account of the economic changes under conditions of globalisation and the kinds of knowledge needed and prioritised.

[21] One of the more interesting aspects of educational policy discourses in South Africa which the paper alludes to is how concepts associated with neo-liberal, free-market ideologies get subsumed in progressive discourses (the forms of policy borrowing). Efficiency is one such concept. A charitable interpretation of this process would be to suggest that this is part of the hegemonic struggle for the re-appropriation of concepts to progressive ends. True as this might be, the appeal of the new educational discourse and the difficulties of struggle against, show how potentially inequitable ideas can be cloaked with left rhetoric. The Outcomes Based Education (OBE) and National Qualifications Framework (NQF) debate is one such example.

[22] These included the fact that the present system is still bureaucracy heavy due to the constitutional agreement to create nine provincial departments and that 'right-sizing' the education public sector is not an easy political process.